

Release 2.17.4

Note: If you have custom forms defined in IQX, not all new features may be available to you. Your agency custom forms are shown on Help – About.

New Features

Users

Alternative IQX button bar - left position and new icons

An alternative IQX button view has been set up in IQX to give the User more flexibility arranging their view of IQX. A User will be able to switch the button bar between the existing horizontal top view and the new vertical left view, according to personal preference.



2/10

2024/05/03	20.50				2/10	5
File Edit	Select	Accounts	Compliance	Maintenance	Window	Help
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This feature requires System Administrator set up.

Completed Timesheet - new line to show Tax Method & IR35 Status

A new line has been added to completed timesheets showing the tax status of the Candidate and IR35 status where their Tax Status is Ltd/Umbrella or Self Employed.



Requires System Administrator set up.

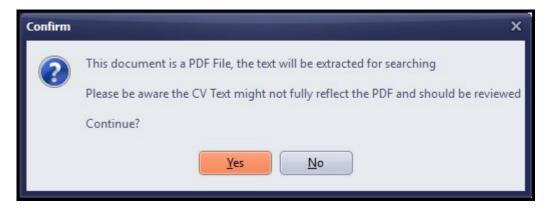
	Bill Invoice ment										
	linvolved										
	Status	Status - Ltd	Co/Umbrel	lla IR35 - 1	Taxable						
	Add	Totals :-	Units Paid	- 25.50 U	Jnits Cha	rged - 25.	.50 Amou	unt Paid - 4	465.38 /	Amount Ch	arged
Line No.		Totals :- Unit	Units	Pay A	Amount	Units	Charge		Orada	Amount Ch AWR? Ltd?	

Converting pdf CVs into CV text

It is now possible to use CVs in PDF format. The text will be extracted and added to 'CV TEXT'. This can be used for searching or inserting into CV template to create a formatted CV.

You can create a candidate from a PDF CV using load CV or dragging and dropping the file onto IQX.

Click yes at the next view. Note the CV Text might not fully reflect the PDF and should be reviewed.



Custom columns on Temp Desk

There are now three custom columns available on Temp Desk. These can be added to Temp Desk: Vacancies, Temps, VAcancy Shifts, SHifts, Placements and Timesheets.

	Search Expand Add	Show:	Shifts in We Current State		in Week Add Shifts Fill St
	Job Title	TheirRef	Last Shift2	refcode	Company
•	Driver		05/03/2017	2063	A & M Stephens
	Bricklayers	VHS01	05/03/2017		Premier Inn
	FLT		01/01/2017		Premier Inn

Requires System Administrator set up.



Compliance Document Improvements

A colour scheme has been added to Compliance documents (red – archived, blue – redacted and black – current). Compliance documents can now be added using the Add button and selecting the relevant document.

When a document has been added, or amended the view will automatically refresh to display the change.

Veb Reference Expand Add Redact Archive/Un		s Delete	Show Archived Show Details
Description	Туре	File Type	Publish to Web In CV Send 🔺
Penelope Alexander Qualification	Qualification	PDF R	
Penelope Alexander Qualification	Qualification	PDF O	
Penelope Alexander Contract	Contract	PDF O	A 🗌 🗌
Penelope Alexander Qualification	Qualification	PDF O	A 🗌 🗍 =
	Description Penelope Alexander Qualification Penelope Alexander Qualification Penelope Alexander Contract	Description Type Penelope Alexander Qualification Qualification Penelope Alexander Qualification Qualification Penelope Alexander Contract Contract	Description Type File Type Penelope Alexander Qualification Qualification PDF R Penelope Alexander Qualification Qualification PDF O Penelope Alexander Contract Contract PDF O

Timesheet Image improvements

A new dialogue box has been added to filter timesheets in Accounts – Timesheet Image Linking.

Infrastructure	Company Division	Exclude Secondary Agency Timesheets
Demo - Construction ABC	Weekly Year 2016 Week 49 Ends	12/03/2017
Timesheet	Images Prev. weeks 0	
Search 🗋 New Dup	ol. 🖹 Open 🚺 🗌 Linked	Candidate 🗿 Refresh
L Number P	5et Scan Image Filter	- 🗆 X
> Infi	rastructure Company Division Exc	clude Secondary Agency Timesheets
De	mo - Construction ABC - Weekly - Year 2016	Week 49 Ends 12/03/2017
		Prev. weeks
		OK Cancel

This will increase speed of forms as you set multiple filters at once then apply them.

If 'LINKED' is ticked, the cursor now stays at the same timesheet allowing additional docs to be attached as required, after linking.

In the Search dialogue, additional columns have been added, Site and Period.

Search for Provisional Timesheet X										
Search Characters										
Surname	Forenames	Payroll No.	Job Title	Site	Company	Account Code Period	Timesheet	Invoice		

A new button has been added to go directly to the Candidate from Timesheet Image Linking.

Infrastructure	Company Di	vision		Exclude S	econdary Agency Timesheet
Demo - Construction ABC	Weekly	Year 2016	Week 49	Ends 12/03/2017	
-Timesheet-		-Image:	Prev. weeks		
Search 🎦 New Dup	l. 🐴 Ope	n 0	Linked	Candid	late 🗿 Refresh

Timesheet Image Linking - Saving rotated timesheet images

It is possible to rotate and save new position from within IQX. The saved position is kept when invoicing.

Availability - open an automatic Contact Event

If you have an automatic contact event created when entering candidate Availability/Unavailability/Holiday it is now possible for the Contact Event to automatically open so that additional information can be added.

Requires System Administrator set up.

Withholding

Withholding has been reviewed to draw together all information on Person/Company/Vacancy withholding into a new view on each form Withholds. Refer to Withholds for more information.

Broadbean - Retention of advert details

When pressing the FINISH button on the IQX Broadbean form whilst posting a job to Broadbean, the following message is shown:

x
n?

If user selects NO,



TQX X Your Broadbean record has not been saved

they will be taken back to the advert page in IQX to allow them to amend and use 'SEND ADVERT button.

If Cancel clicked at any time the advert will be lost.

System Administrator

Bankscan

Bankscan.dll Sort Code and Account Number checking is no longer supported by the third party that has provided it. In the near future we will stop sending out the monthly dll updates as they will not be available.

We have developed an internal mechanism that enables checking of Sort Code and Account Numbers.

For IQX versions 2.17.4 onwards will have a General Setting - Accounts - 450 Internal Bank Scan that needs to be set to Y.

	General Settings									×		
N •	ame or No	otes bank scan	Search Gro	up All	- Branch	All	✓ Ge	t Colour	Save and Close	Abandon	Update	
	No	Group	Name	•		Value				Notes		-
Þ	450 A	Accounts	Internal Bank Scan		Y							
												-
1	[]]											

If a sort code or account number is warned as Not Valid, but is correct, it is still possible to contact IQX for an override code.

In addition, the IQX Systems Administrator, and the Accounts Dept, can be given access to an xml job that will manually add a sort code to the allowable list. The addition is audited.

Alternative IQX button bar - left position and new icons

Turn on the alternative button bar in General Settings - Switchable Fields 2860.

2860 Switchable Fields Show Alternative Menu Y If Yes	If Yes then Show the menu on the left, if yes show the menu on the top



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A User will be able to switch the button bar between the existing horizontal top view and the new vertical left view, according to personal preference.

Timesheet Image Improvements

A new validation function has been added in Database Functions – Pre-Validation Functions – Timesheet Image Link Pre-Validation. T

Database Functions	Headlines	+	
Run a Job	Self Bill Functions	•	
SQL Tool	Invoice Functions	+	
SQL Tool (non-modal)	Pre-Validation Functions	•	Vacancy Pre-Validation
Database Diagnostics	Validation Functions	•	Placement Pre-Validation
Broadbean	Change Functions	•	Temp Shift Pre-Validation
IQXWeb Setup	AWR	•	Timesheet Pre-Validation
~~~~	Custom Column Settings	•	Temp Shift Plan Pre-Validation
	Compliance	•	CV Sending Pre-Validation
	IQX Hub	•	Timesheet Image Link Pre-Validatio

# **Compliance Documents - Created Date**

In Compliance - Compliance Documents it is now possible to have the file created date added to the file details in IQX instead of the date the file was added to IQX. This function is switchable using General Settings - Settings 2090.

121	2080 Settings	Disable editing of Person Phones fields	Y	Can s
•	2090 Settings	Use File Creation Date for Compliance Documents	Y	
	10 7	1 P 11	-	

# **Custom columns on Temp Desk**

Additional custom columns are available on Temp Desks. PLease contact Support for changes to Temp Desk custom grid column function.

Additional custom columns are activated by setting the required number in General Settings – Temps – 1110. The default value is 1.

100	riou temps	Show rate margin on placement by 1	
•	1110 Temps	Number of Custom Columns on the 3	Default to 1. Max 3.

# Make telephone numbers Read Only on front candidate page

It is now possible to make the telephone number, email address and social media contacts on the

Person view, Read only. They will only be editable in the 'Get in Touch' view.

General Settings - Settings 2080 Disable editing of Person Phones Fields set to Yes

201	2070 Settings	Desktop Tracked Vacancies State	X	vacancy state code eg c
19	2080 Settings	Disable editing of Person Phones fields	Y	Can still be edited via the Get In Touch View
	2090 Settings	Use File Creation Date for Compliance Docume	Y	

## Completed Timesheet - new line to show Tax Method & IR35 Status

A new line has been added to completed timesheets showing the tax status of the Candidate and, where their Tax Status is Ltd/Umbrella or Self Employed, the IR35 status of the timesheet. The status depends on if overrides have been ticked in the related Vacancy, Placement or Company record.

Contact Support for a revised Temp Timesheet Complete function.

Self Bill Invoice						
Comment						
AWR Involved						
Tax Status	Status - Ltd Co/Umbrella IR35 - Taxable	-				
Add	Totals :- Units Paid - 25.50 Units Charged - 25.50 Amount Paid - 465.38 Amount Charge	ed - (				
Line Description	Units Pay Amount Units Charge Amount Paid Rate Paid Charged Rate Charged Grade AWR? Ltd?	-				
1 Standard	Hours 25.50 18.25 465.38 25.50 22.50 573.75 N					

# Availability - user switch to open an automatic CE

Set General Settings - Temps 439 to Y and ensure General Setting - Temps 440 has a relevant contact event code.

Na	ame or Not	tes notifi	Search Group Temps - Bran	ch All	- Get Colour	Save and Close Abandon Updat
	No	Group	Name		Value	Note
	439 Te	mps	Open Availability Notification Contact Event	N		Requires 440 below to have a va
	440 Te	mps	Availability Notification Contact Event Type Code	AN		
	441 Temps		Notification Contact Event Type Code	20		

# Accounts Role - Viewing Availability View and Compliance Overview

Account Role Users can now see Candidate Availability and Candidate Compliance Status in the Person Record.



Employment Periods
Availability
Compliance Status Compliance Detail

# **Division Filtering on Reports**

All reports can now be filtered by Division. Select a report and click Edit. Click Change Division Filters and exclude/include the required Divisions. The included Divisions are shown in the divisions column next to the report description.

0									
	IVAN					3	Hel	p	
(	aily Work List	Open	New	lit Delete	Report	Locate			
	Diary	Contact Even	Report ts due for Callback	Inf	Divisions rastructure		Notes		
1	Make Divisio			ents due for Callback"	X	() Report / Jo	Ь	-	_ 🗆 X
F	Excluded Divi Corporate International Support	sions		Included Divisions Infrastructure			Contact Events due for Ca Browse Contact Events due for Ca	Design	
			>			Sort Order	0 Bran Change Division Filters		visions
				:		(	Preserve Report Orde	Infrastruct  Preserve  Cancel	e Report Selection

For new reports first add the report filling the required information and after saving go through the process described above.

#### Audit Broadbean advert creation

Completing or aborting a Broadbean advert is automatically audited in the Vacancy and Database Diagnostics - Audit Trail.

Description	vvnen	Login Name	UId Values	New Values	Connection ID	1
Broadbean Advert Created	11/04/2017 16:56	:06 IVAN		XX1AUBIB110420170	4	
Broadbean Advert - User Aborted	11/04/2017 16:55	:55 IVAN			4	
Launched Broadbean web site for this v	11/04/2017 16:53	:00 IVAN		http://www.adcourier	4	



#### Ability to save Stored Searches in Users

Searches made in Maintenance - Users can now be stored.

Select Users						_ 🗆 X
Login Name I Selection Search		Find New		Close	Help	
Selection	All	- Retriev	e Save	Delete		
Search		Owner			Name	
Stored Searches	▶ IVAN		full rights			
Reports						

Saving a stored search is the same as for any current search. Create a search – Select Stored Searches – Save (as per other stored searching).

### WPKmaintain

A new version of wpkmaintain.exe is available and will work with old releases of iqx. Please contact IQX for further information.

# Updated dll package

An updated dll package has been produced to add in the latest ssl dlls and zlib1.dll. Please contact IQX for further information.

